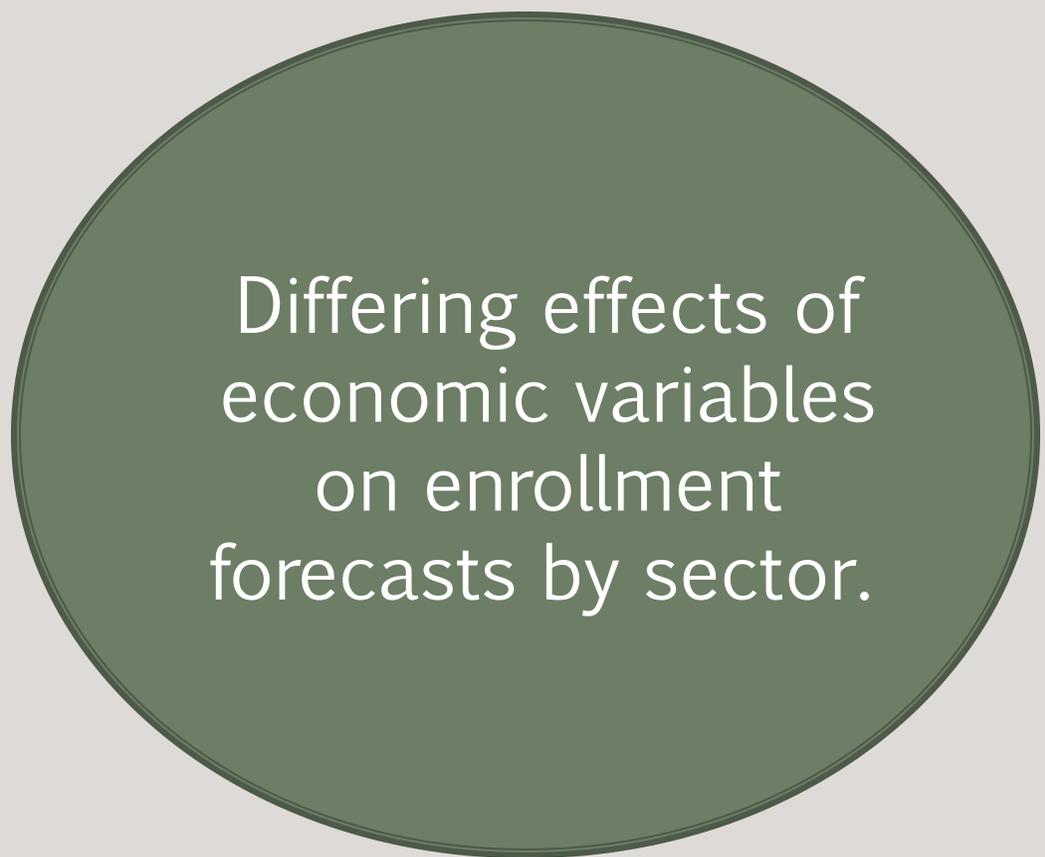




FORECASTING SC HIGHER EDUCATION ENROLLMENT

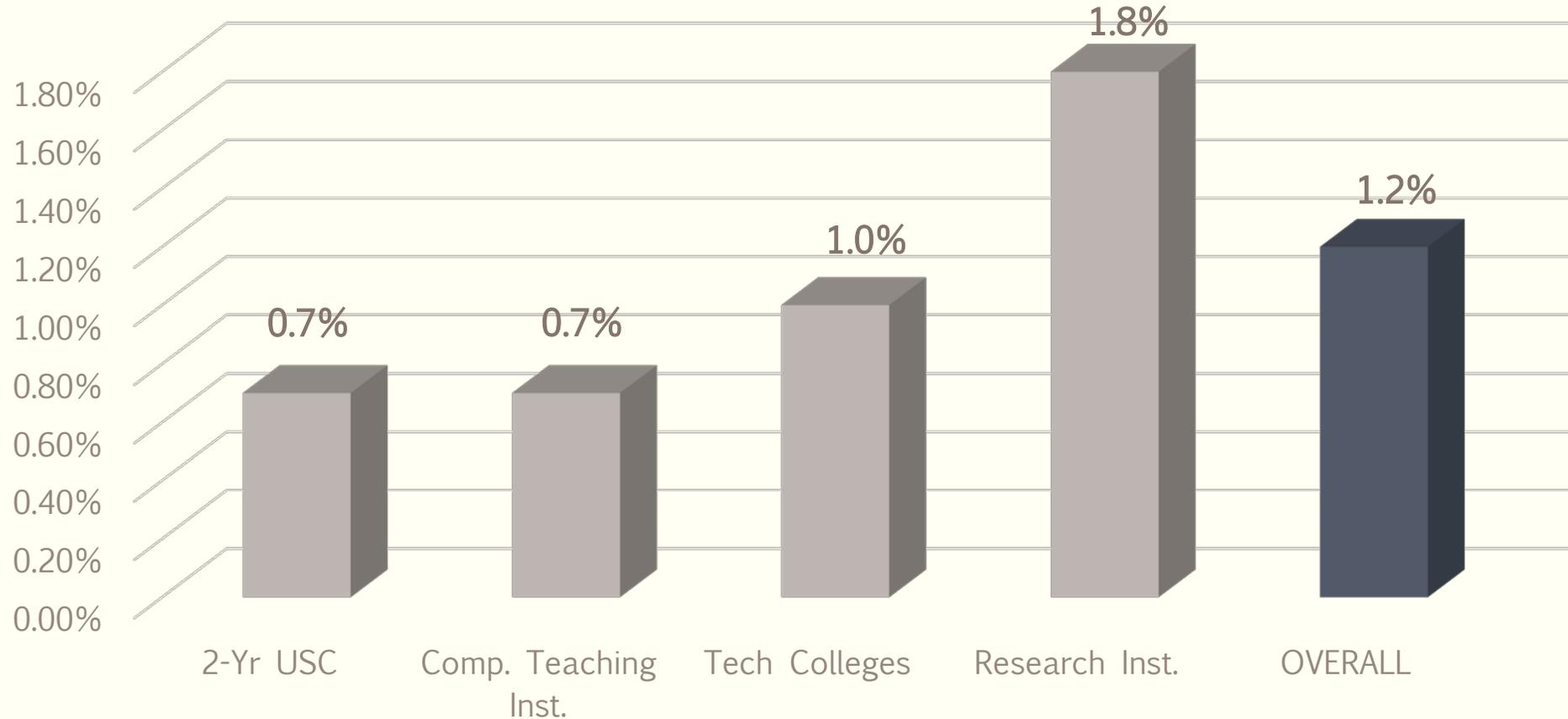
2015-2023



Differing effects of
economic variables
on enrollment
forecasts by sector.

Report by: Erica Von Nessen, Ph.D.
SC Commission on Higher Education

Projected Annual Enrollment Growth Undergraduate Students



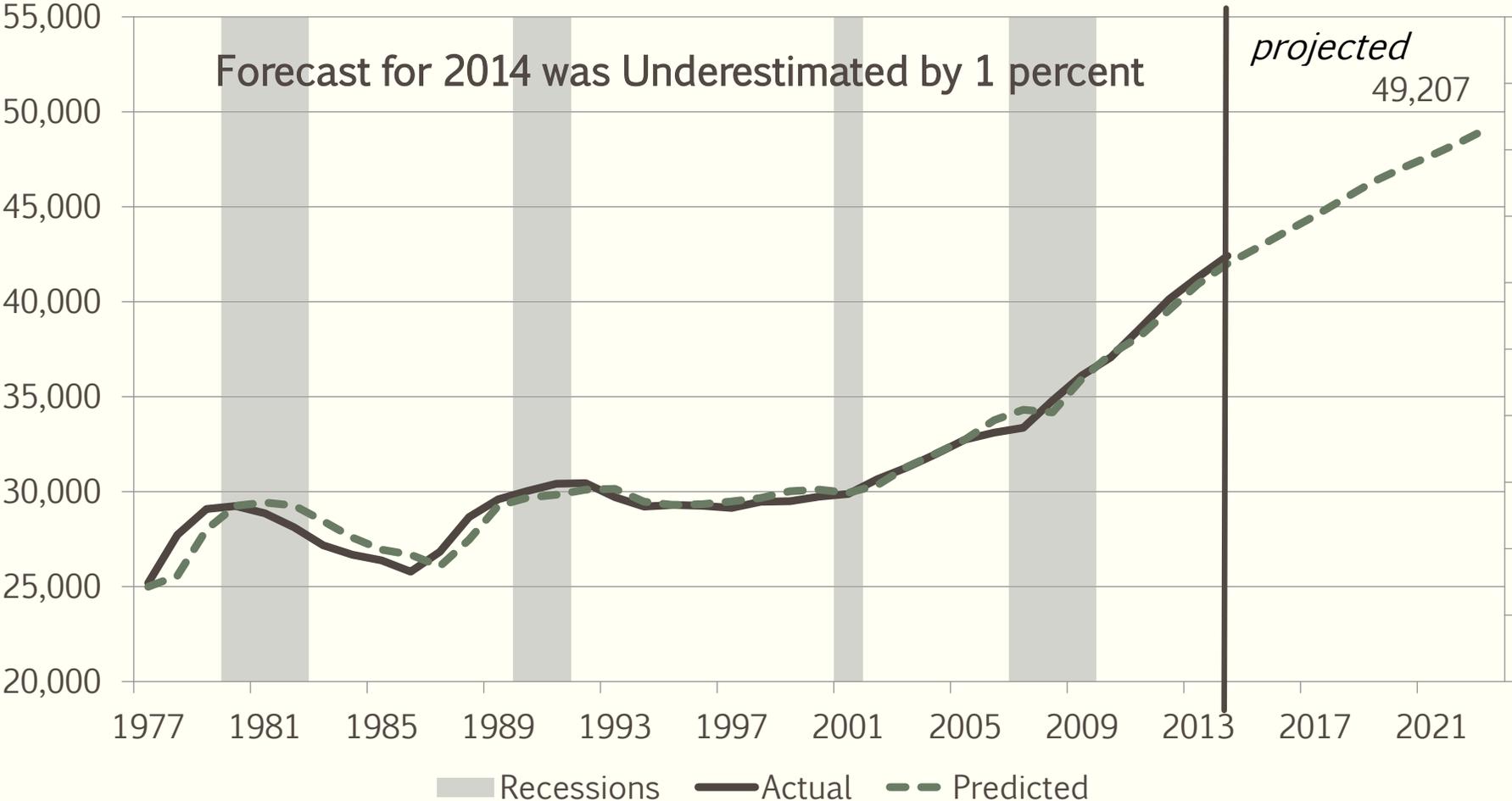
Enrollment expected to increase for all public sectors at differing rates through 2023.

Overall expect about 21,500 more students enrolled in 2023 compared to 2014.

Modeling Approach

- Each sector was modeled separately using historical headcount data as well as economic variables, as appropriate.
- Sought simplest model that correlated well with historical data and provided subjectively reasonable projections.
- Models were determined with data through 2013 to allow for a check using 2014 forecasted vs. actual counts.

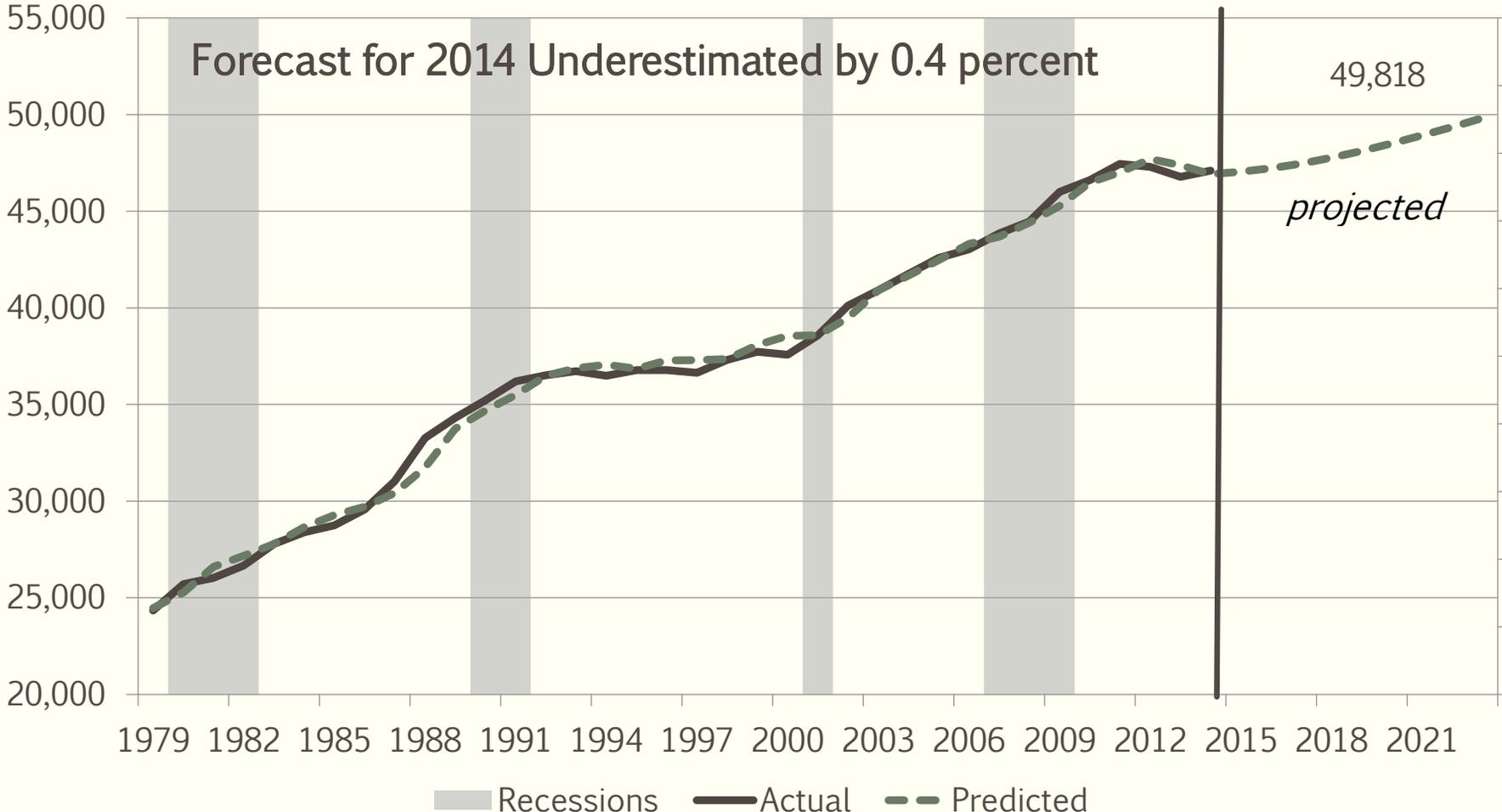
Research Institutions-Undergraduate



Headcount expected to increase 1.9% between Fall 2014 and Fall 2015 and continue to grow at about 1.8% per year through 2023.

Headcount previous year, statewide real personal income per capita, and number of public high school seniors prior year were all significant predictors of enrollment.

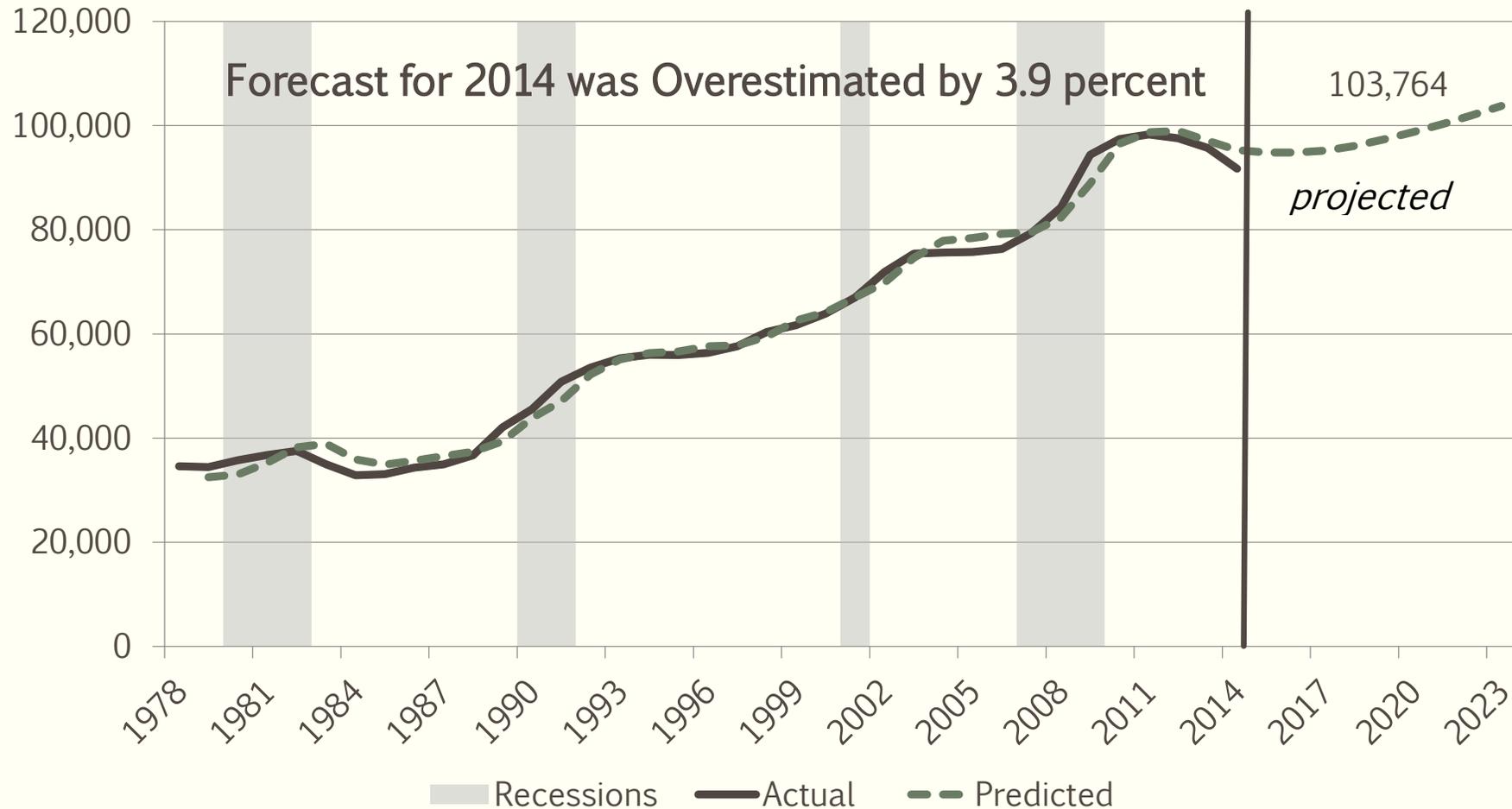
Comprehensive Teaching Institutions-Undergraduate



Headcount expected to increase 0.3% between Fall 2014 and Fall 2015 and continue to grow at about 0.7% per year through 2023.

Headcount previous year and statewide real personal income per capita were significant predictors of enrollment. Unemployment a significant predictor 1990-2013.

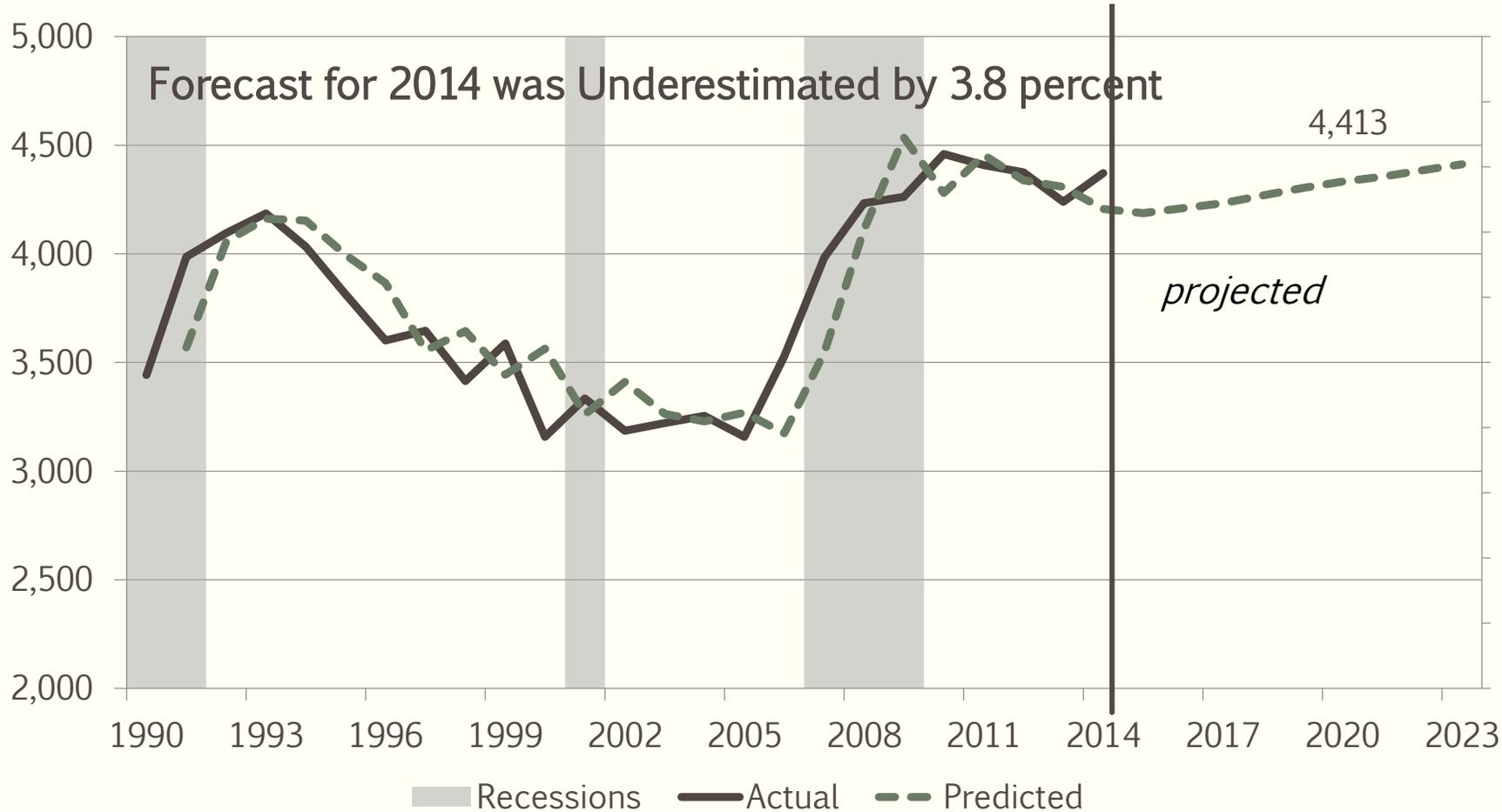
Technical Colleges-Undergraduate



Headcount expected to decrease 0.5% between Fall 2014 and Fall 2015 but continue to grow at about 1.0% per year through 2023.

Technical College headcount previous year and statewide real personal income per capita were significant predictors of enrollment. Unemployment a significant predictor 1990-2013.

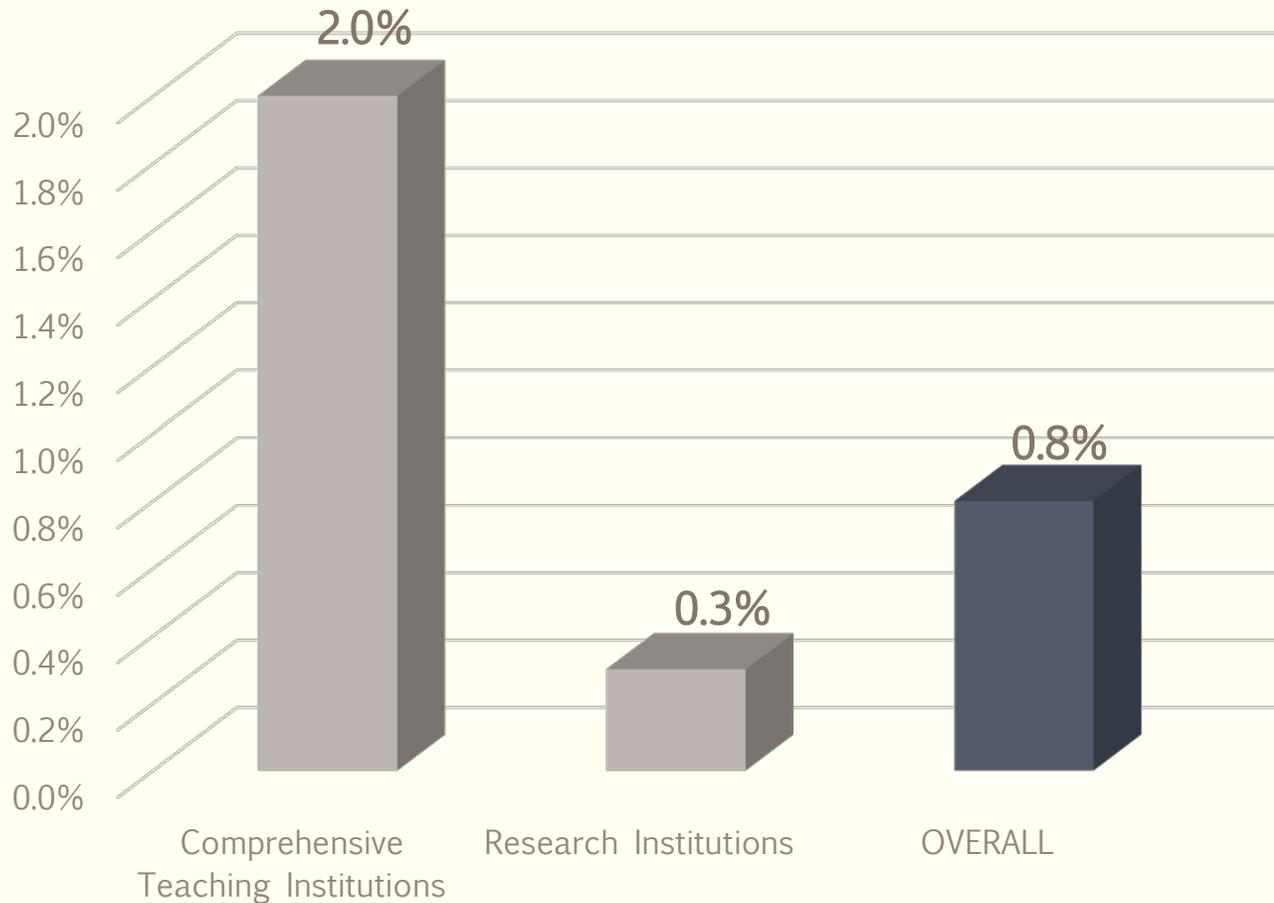
USC Two-Year Regional Campuses-Undergraduate



Headcount expected to decrease 0.5% between Fall 2014 and Fall 2015 but continue to grow at about 0.7% per year through 2023.

Two-year campus headcount in prior year and regional average, annual unemployment rate were significant predictors of enrollment.

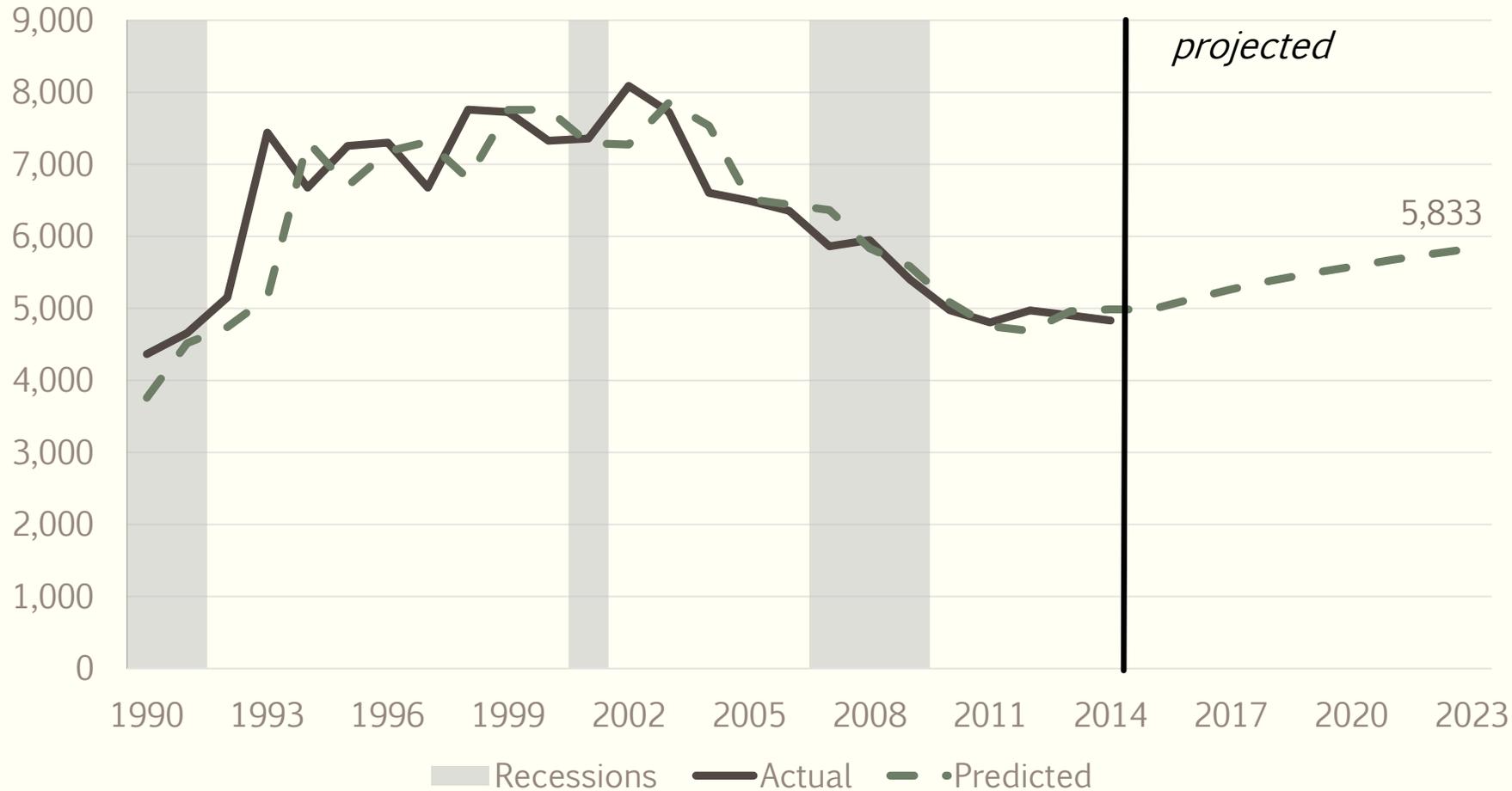
Projected Annual Enrollment Growth Graduate Students



Enrollment expected to increase for both sectors through 2023.

Comprehensive Teaching Institutions starting from lower base than Research Institutions but faster projected growth will increase their share of students to about 27% by 2023.

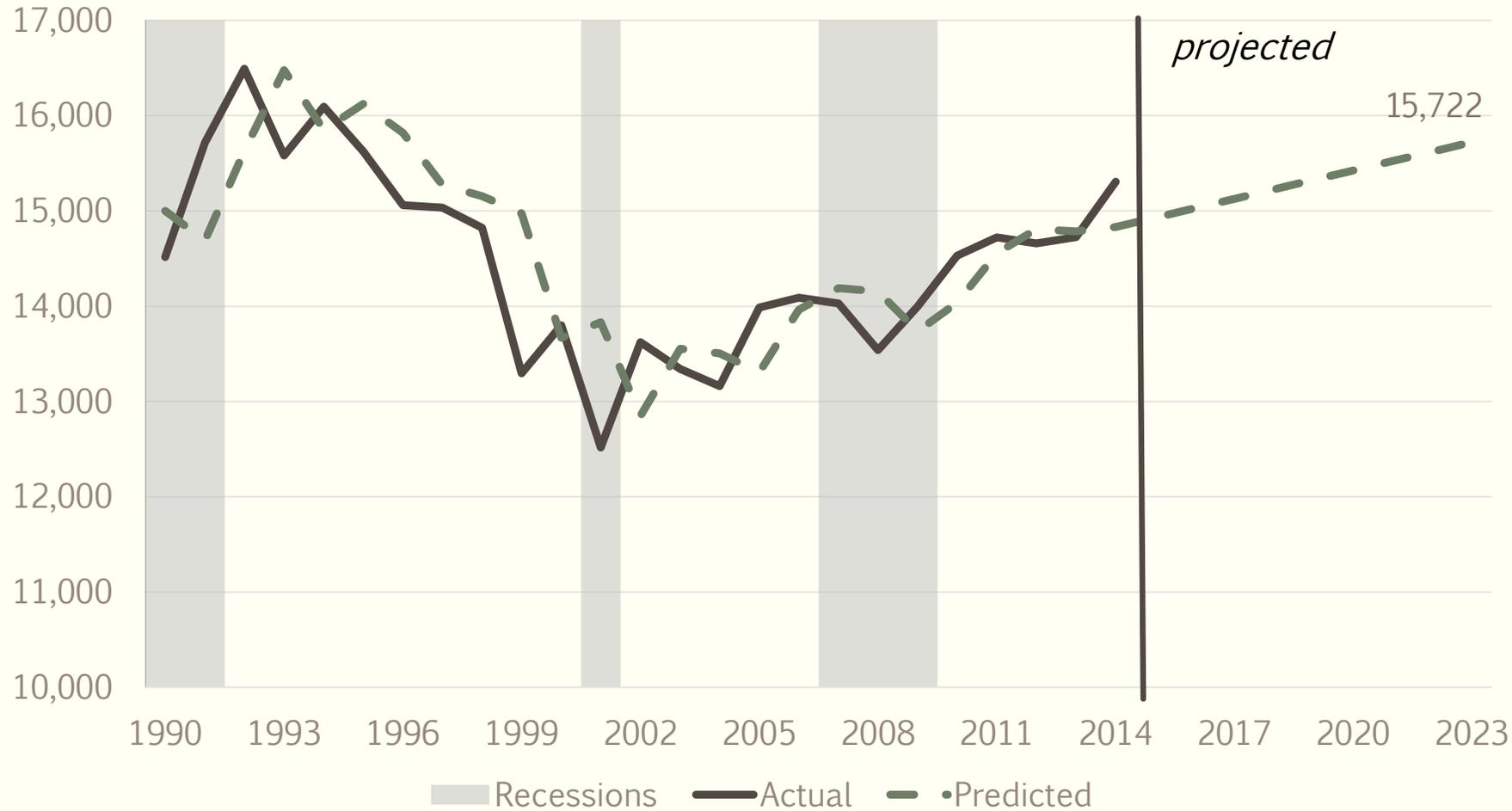
Comprehensive Teaching Institutions-Graduate Students



Headcount expected to increase 1.7% between Fall 2014 and Fall 2015 and continue to grow at about 2.0% per year through 2023.

Headcount in prior year, statewide unemployment rate, and per capita personal income were significant predictors of enrollment.

Research Institutions-Graduate Students



Headcount expected to decline 2.5% between Fall 2014 and Fall 2015 but continue to grow at about 0.3% per year through 2023.

Headcount in prior year was the only significant predictor of enrollment.

Conclusions

- Enrollment will continue to increase across all sectors, in the aggregate.
 - Individual institution enrollment may vary.
- Economic conditions (such as the unemployment rate), while not significant across the entire period studied, are playing a greater role in enrollment decisions in the near past.
 - Two-year USC campuses significantly influenced.
 - Technical Colleges and Comprehensive Teaching Institutions significantly influenced in more recent recessions.
 - Graduate programs at the Comprehensive Teaching Institutions experience the opposite effect of economic downturns.
 - Research Institution enrollment at the undergraduate level more dependent on traditional aged students coming through high school pipeline.